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Annual Trustee Development Conference

EFFECTIVE PROVINCIAL LEADERSHIP
School Boards Managing The Message

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ONTARIO PUBLIC SCHOOL BOARDS' ASSOCIATION

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A FRAMEWORK FOR POLITICAL ACTION

Introduction

One of the primary purposes of OPSBA is to advance the interests of member boards in relation to government policy and legislation. This mandate requires that OPSBA establish and maintain effective relations with the government, its Committees, Ministers and their staff, and Ministry staff. Our relations and communications with our member boards and other "publics" including the media must be supportive of this primary relationship with the government.

These guidelines set out OPSBA's ways of "doing business" as it seeks to influence the political processes involved in the development of government agendas, policies and legislation. Influencing government is usually referred to as lobbying - a set of activities and strategies that includes:

* monitoring the political and policy environment
* research and development of positions
* management of concensus development
* public opinion polling
* development of alliances and coalitions
* government relations
* communications
* media relations

Such a broad range of activities involves OPSBA's member boards, Regions, Committees, Board of Directors and staff. Success requires high levels of cooperation, effective strategies for building consensus and ownership, and collaboration amongst staff.

Improving Effectiveness

Improved effectiveness in lobbying requires:

* Focus - develop clearly defined, clearly articulated positions
* Flexibility - positions that are developed from clear underlying principles allow the flexibility necessary to negotiate or mediate solutions with government
* Credibility - requires profile of OPSBA within its membership, at Queen's Park and with civil service to be raised

* Information - excellent information and communication flow between OPSBA staff and Ministry staff must be developed. Since this requires "risk-taking" staff must exercise high ethical standards and integrity in the use of information

Strategies

1. **Develop Concensus within OPSBA on Major Issues**
   * ensure increased understanding of issues amongst boards and trustees
   * facilitate a united message to government

2. **Build Alliances**
   * promote increased understanding of issues among key groups
   * develop support on an issue by issue basis from other key constituencies that have a similar interest

3. Issue Management
   * develop plans and strategies on an issue by issue basis; identify techniques, consultation processes, lead responsibilities and follow up plans
   * establish priorities and follow-up activities or strategies
   * reduce the need for reactive responses

4. **Communication with Ministry of Education**
   a) Minister of Education
      * develop and maintain effective communication with the Minister, both directly and through political staff.
      * obtain occasional general meetings and seek meetings on specific issues as necessary
      * provide opportunities for participation in OPSBA activities involving members

   b) **Ministers' Political Staff**
      * increase contact on an issue by issue basis
      * assess interface between Minister and civil service

   c) **Civil Service**
      * develop program of key civil service contacts
      * promote positive working relations
      * all contacts must be consistent with the goals of the organization

5. **Other Government Structures**

a) **Cabinet and Cabinet Committees**
* ensure knowledge of structure, and mandate of Cabinet decision making processes remains current
* develop key contacts to ensure current knowledge of issues and priorities
* on issue by issue basis prepare submissions or meetings with committees

b) **Other Ministries**
* increase interaction with other key ministries on an issue by issue basis - Labour, Environment, Municipal Affairs, Community and Social Services, Health, Treasury and Economics, Revenue
* identify current school board issues in all areas, determine priority, establish issue management plan
* monitor and assess relevant policy development in other ministries
* develop key contacts using model of relations with Ministry of Education

6. **The Legislature**
* maintain key focus on Government members, provide information on OPSBA, and its priorities
* monitor legislature, issues, timetables etc.
* enhance "politician to politician" contacts (ie. OPSBA leaders, member board chairs, etc).
* provide information, encourage support of Opposition members
* assist boards to develop local contacts with MPP's, in support of local positions within the framework of OPSBA positions and priorities.
* develop contacts with key legislature staff eg. Committee staff, research staff

7. **External Relations**
* monitor environment, know positions of other stakeholders, interest groups and "influencers"
* develop outreach/communication strategies that will assist in policy development and the promotion of OPSBA positions
* monitor the development of policy within political parties, ensure OPSBA's relations are "non-partisan"

8. **Media Relations**
   * enhance public profile of OPSBA and its positions through effective media releases, provision of information, providing spokespersons
   * provide support to boards through media releases, background information etc. for local level media management on key issues.

9. Public Opinion
   * monitor trends in public opinion with respect to issues in education
   * use knowledge of opinion to "position" OPSBA's positions on an issue by issue basis

MODEL FOR ISSUES MANAGEMENT

MONITOR:

- the government political and policy environment, other interest groups, etc

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ISSUE IDENTIFICATION AND PROJECT PLANNING

- issue identification, implications, assessment, objectives, strategies, resource allocation, methodology, process, etc

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ANALYSIS AND DEVELOPMENT OF POSITION

- project planning, process, methodology
- research, analysis, writing report
- consensus building, development of position

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IMPLEMENTATION

- through: government consultation process, meetings, etc
- communication with membership and promotion of issues
- alliances,
- communication strategies,
- media
- working groups with government and/or others

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EVALUATION

- for achievements
- for effectiveness of process, etc

POLITICAL ACTION MODEL

STEP 1. DEVELOPMENT OF ASSOCIATION POSITION/POLICY

- monitoring political/policy environment
- research & analysis
- membership input
- consensus management

STEP 2. POLITICAL ACTION

GOVERNMENT RELATIONS

examples

- regular trustee meetings with Minister of Education
- daily contact with civil service (staff -- staff)
- trustee meetings with government ministries:
  ie Labour
  Environment
  Community & Social Services
- association/ministry liaison committees
  ie Env. Project
- OPSBA Executive Council meeting with Cabinet (yearly)
- OPSBA participation on government committees
  ie FTC
  Education Finance Review
  Education Restructuring

QUEEN'S PARK

examples

- newsletter designed for MPPs
- trustee meetings with MPPs
- staff contact with caucus & opposition office staff
- monitoring daily activities of the Legislature
- presentations to committees of the Legislature
- guest editorials in OPSBA publications from Queen's Park "Movers & Shakers"

POLITICAL ACTION

examples

- monitoring political & policy environment
- research & development of positions
- management of consensus
- public opinion
- alliances
- government relations
- communications
- media

EXTERNAL RELATIONS

examples

- building alliances with local, provincial and federal organizations including business, labour, home & school municipal & community based organizations
- assess collaboration with other trustee associations
- trustee/MPP contact program at local level

MEDIA RELATIONS

examples

- inform Queen's Park Press Gallery of OPSBA positions & reactions to government initiatives
- pursue articles and general coverage in the media that reflect OPSBA political priorities

POLITICAL ACTION MODEL

Example: OPSBA & 1992 Transfer Payment to Education

STEP 1. **DEVELOPMENT OF OPSBA POSITION - BY POLICY COMMITTEE, ADVICE FROM TECHNICAL ADVISORY COMMITTEE**

STEP 2. **POLITICAL ACTION**

GOVERNMENT RELATIONS
actions
• brief to Minister and key civil service
• brief to all Cabinet ministers & deputy ministers
• Nov. 18, 1991 meeting with Minister of Education
• staff contact with Ministry of Education, Treasury and Economics
• follow-up with letter to Minister re joint action on recommendations
ie ministry/association's discussion of GLG Reg. prior to finalization
• government/association meetings/ committee on solutions
QUEEN'S PARK
actions
• press release / transmittal of brief to all MPPs and to PC and Liberal educations critics
• staff to staff discussion with PC Caucus and Liberal Caucus
• staff input to Liberal Caucus briefing
• on-going information on QP economic statements to members (Fast Reports)
• reiteration of key points by trustees to Standing Committee of Legislature (Dec. 6, 1991)
• opposition leaders' statements in Legislature supporting OPSBA's position
POLITICAL ACTION
EXTERNAL RELATIONS
actions
• transmittal of brief to external associations: trustee, teachers' federations, FTC, AMO etc.
• summary & brief to member boards encouraging support & letters to local MPP, media etc.
MEDIA RELATIONS
actions
• media relations plan / press release etc. for Nov. 18 meeting with the Minister
• on-going contact of press with press
• press releases / contact week of t.p. announcement (Jan. 20, 1992)

THE NEW CABINET COMMITTEE STRUCTURE (1990)

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- THE MANAGEMENT OF THE CABINET
- THE COMMITTEE PROCESS

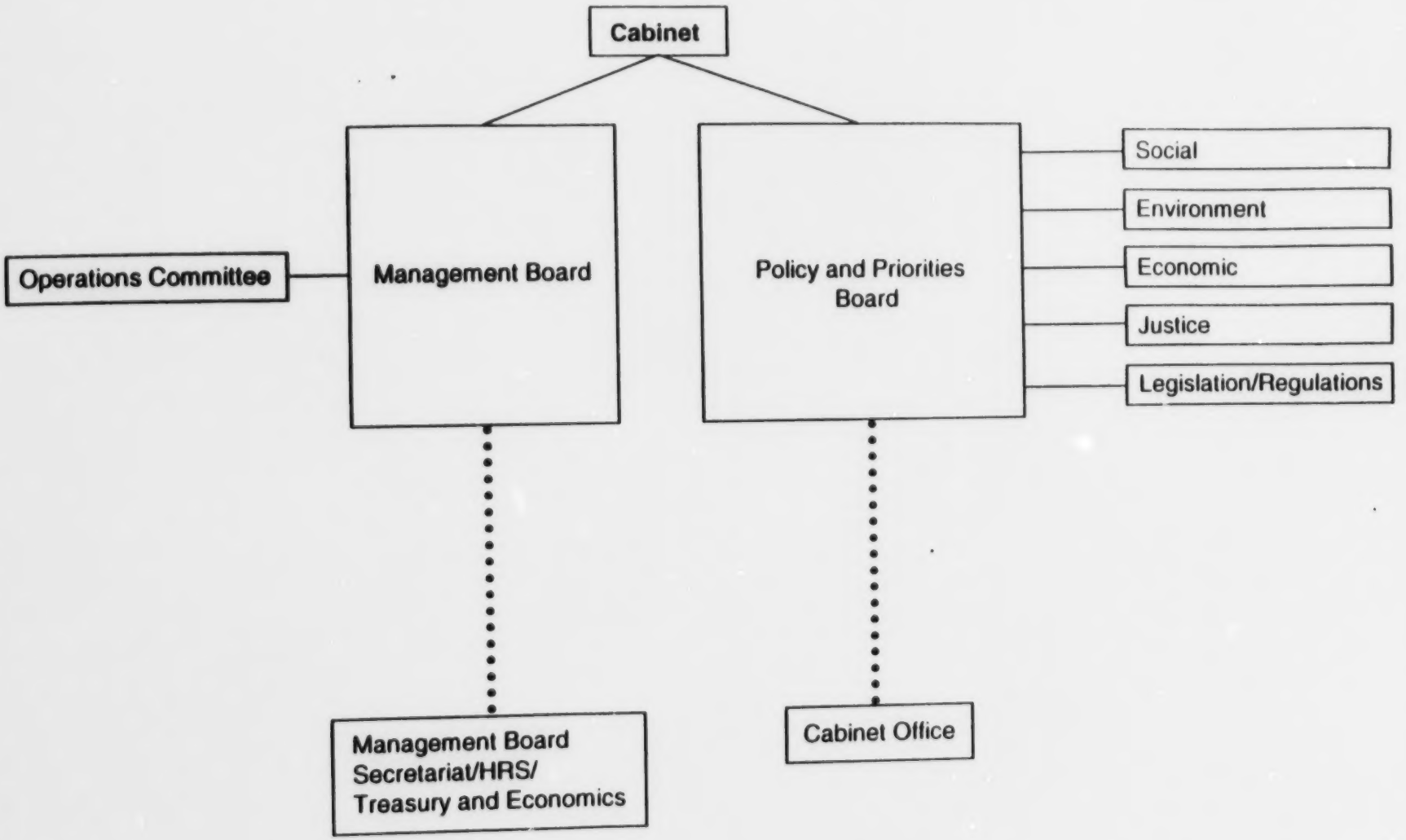
CABINET COMMITTEE STRUCTURE

3 Corporate Committees:

- policy and Priorities Board
- Management Board
- Operations Committee

4 Policy Committees:

- Economic and Labour Policy
- Social Policy
- Environment Policy
- Justice Policy


Cabinet
Operations Committee
Management Board
Policy and Priorities Board
Social
Environment
Economic
Justice
Legislation/Regulations
Management Board Secretariat/HRS/ Treasury and Economics
Cabinet Office

ROLE OF DEPUTIES IN POLICY FORMATION AND CABINET COMMITTEES

- Assign clear Minister and Deputy lead for specific policy initiatives
- Include in direction from Cabinet/Policy Committee the nature of inter-ministry cooperation
- Assign executives and staff to major initiatives across ministries
- Require Cabinet Office to participate as needed to bring forward viable options for Cabinet Committee decision
- Include Deputy Ministers with Ministers in Policy Committee discussions
- Ministers only time on agenda (with political staff)

INTEGRATION OF FISCAL AND POLICY CONSIDERATIONS

- Major challenge for all governments
- New structure and process aim at Cabinet participation in setting fiscal framework and financial priorities
- Separate new initiatives from on-going business
- Reduce conflict between policy and financial advice being presented to ministers

POLICY AND PRIORITIES BOARD

Mandate:

- Set priorities for Government
- Allocate new initiative spending among priorities
- Review all policy recommendations
- Review fiscal strategy/allocations
- Streamline Cabinet agenda

MANAGEMENT BOARD

Mandate:

- Review & recommend medium-term fiscal strategy
- Manage in-year fiscal strategy
- Review & recommend ministry allocations
- Distribute pressures funding

OPERATIONS COMMITTEE

Reports to Management Board

Mandate:

- Review & recommend business/operation of Government issues
- Deal with issues with a regional or political perspective
- Review & recommend staffing and public service issues

LEGISLATION/REGULATIONS COMMITTEE

Reports to Policy and Priorities Board

Mandate:

- To deal with Legislation and Regulations necessary to conduct the business of Government;
- To ensure that draft legislation and regulations accurately represent the policy intentions of the Government and are technically correct; and
- Reviews petitions to Cabinet.

POLICY COMMITTEES (4)

- Manage government priorities and initiatives
- Review & recommend on ministry initiated policy
- Ensure inter-ministry cooperation

JUSTICE POLICY

Reports to Policy and Priorities Board

Mandate:

To promote equity and a fair system of justice for all Ontarian, including:

- The development of policy to maintain and improve the fairness, responsiveness and accessibility of the Ontario Justice System.
- The coordination of Government Policy on issues relating to Human Rights and Race Relations
- Native issues.

SOCIAL POLICY

Reports to Policy and Priorities Board

Mandate:

To develop policies that enhance human services to benefit the people of Ontario, including:

- Development of policy which integrates Health, Education, Housing and Social Support Policy and programs to improve the quality of life of Ontario citizens.
- Development of policies which prevent social problems.

ECONOMIC AND LABOUR POLICY

Reports to Policy and Priorities Board

Mandate:

To build a secure and prosperous economy which serves the needs of Ontario's people, including

- The structure of the Ontario economy, with integrated strategies for labour market and economic development;
- Enhanced competitive position internationally;
- Distribution of benefits of economic policy across Ontario;
- The recognition of the contribution of both labour and entrepreneurial leadership; and
- The development of an education and training system.

ENVIRONMENT POLICY

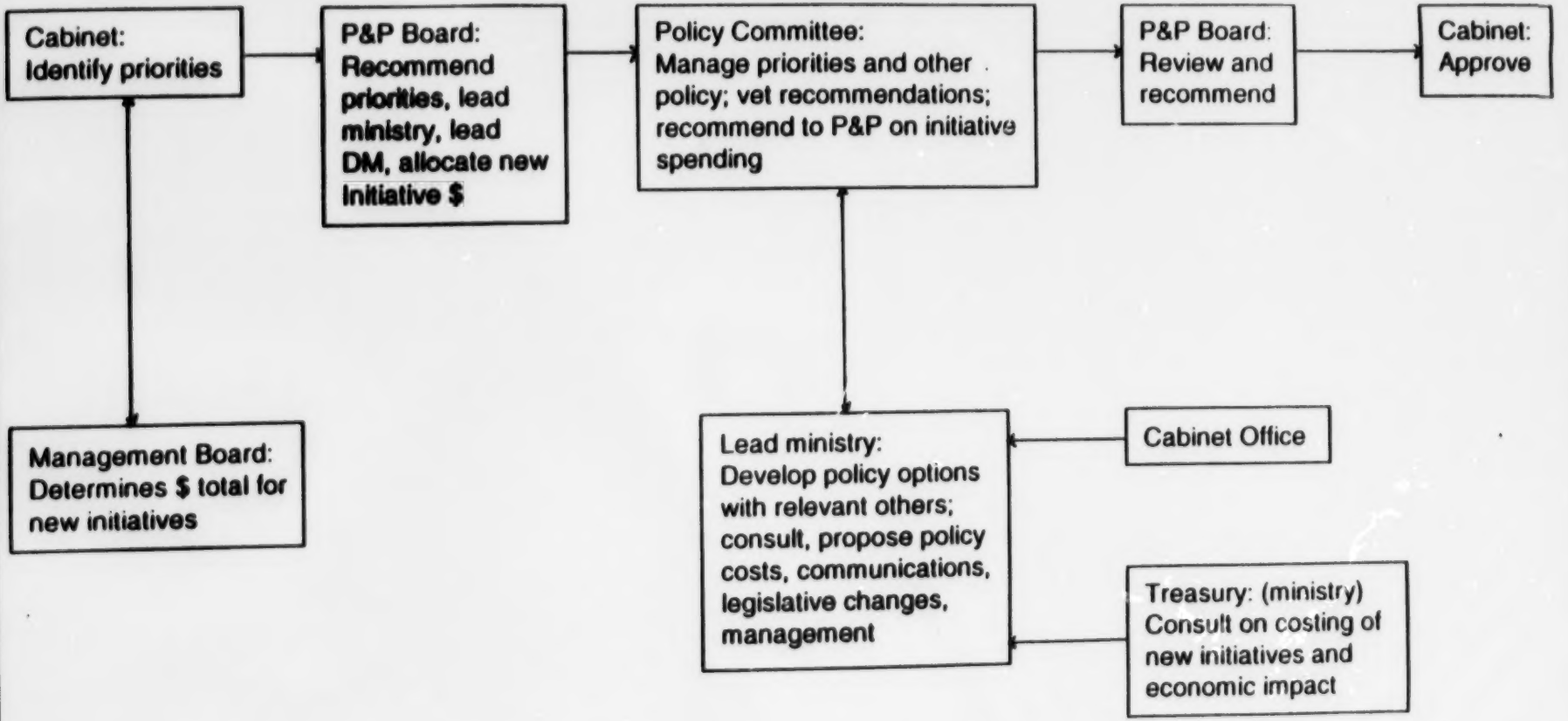
Reports to Policy and Priorities Board

Mandate:

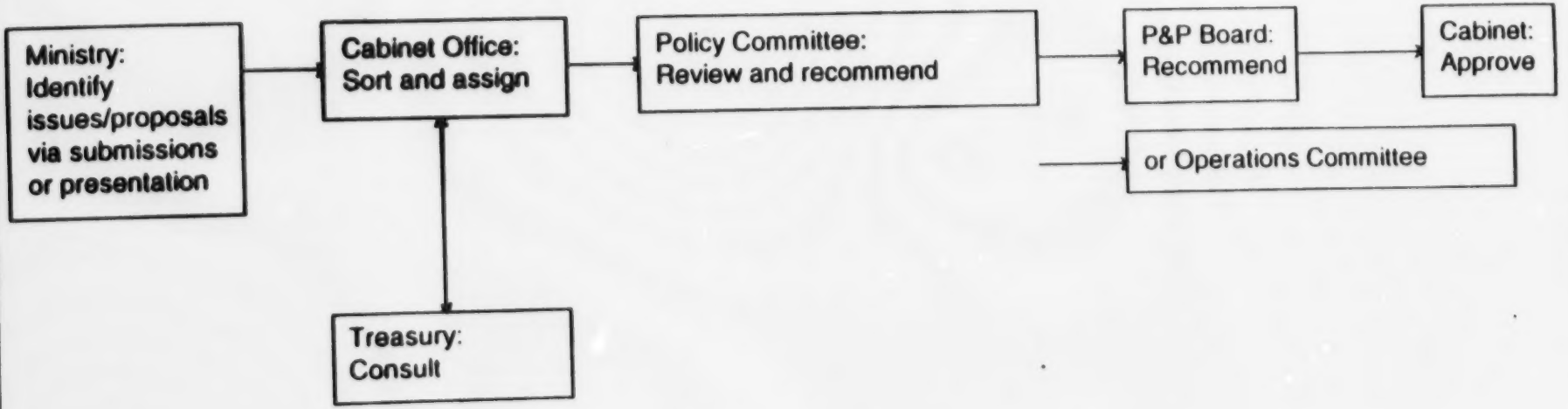
To deal with the protection and improvement of our environment, including:

- Creating partnerships between public, business and environmental communities to support sustainable, non-destructive courses of economic development;
- Reversal and reclamation of areas of environment deterioration;
- Fostering public education and discussion of the environment; and
- Assurance that Ontarians may live and work in a safe and healthy environment.

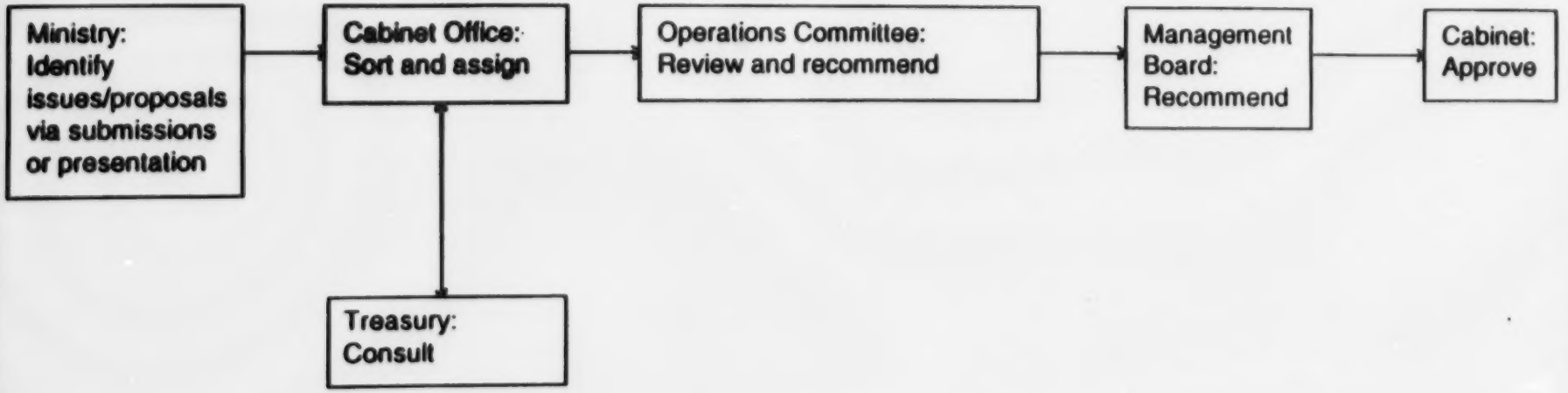
PROCESS CHART 1: Cabinet Initiated Policy


Cabinet: Identify priorities
P&P Board: Recommend priorities, lead ministry, lead DM, allocate new initiative $
Policy Committee: Manage priorities and other policy; vet recommendations; recommend to P&P on initiative spending
P&P Board: Review and recommend
Cabinet: Approve
Management Board: Determines $ total for new initiatives
Lead ministry: Develop policy options with relevant others; consult, propose policy costs, communications, legislative changes, management
Cabinet Office
Treasury: (ministry) Consult on costing of new initiatives and economic impact

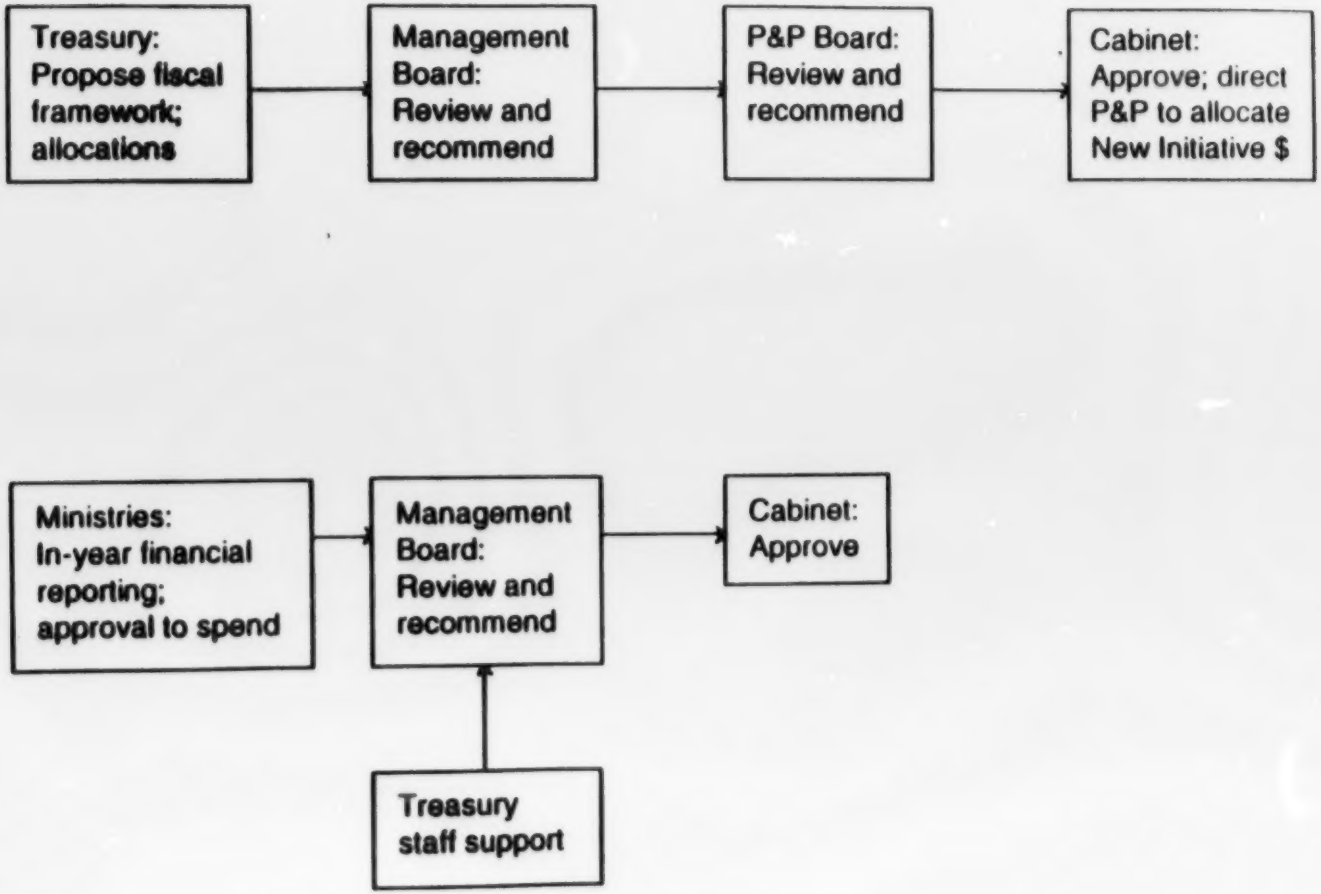
PROCESS CHART 2: Ministry Initiated Policy



PROCESS CHART 3: Government Business and Regional Concerns


Ministry: Identify issues/proposals via submissions or presentation
Cabinet Office: Sort and assign
Operations Committee: Review and recommend
Management Board: Recommend
Cabinet: Approve
Treasury: Consult

PROCESS CHART 4: Fiscal Framework, Allocations and Expenditure Control


Treasury: Propose fiscal framework; allocations
Management Board: Review and recommend
P&P Board: Review and recommend
Cabinet: Approve; direct P&P to allocate New Initiative $
Ministries: In-year financial reporting; approval to spend
Management Board: Review and recommend
Cabinet: Approve
Treasury staff support